

Consumer Insight



Growth through consumer understanding

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board



The Irish Consumer 2015

From recession to recovery: the new consumer agenda

Consumer Insight Team
July 2015

The Study

Nationally representative on-line study

600 respondents

Booster for youth, 300 16-24 year olds

Research partner :

the
futures
company



Ireland

Comparisons with global averages



The global spotlight is on Ireland

Ireland makes headlines around the world with landmark 'Yes' result in marriage referendum

-IRISH TIMES

MAY 2015

calls for full island

'Little island with a big voice': Pride over Ireland's same-sex marriage vote

CNN- U.S.A

calls for full island

Gay marriage vote means 'new normal' for many in Ireland

Boston Irish Reporter- U.S.A

calls for full island

'Yes' Vote: A Momentous Change For Ireland

Sky News- United Kingdom

calls for full island

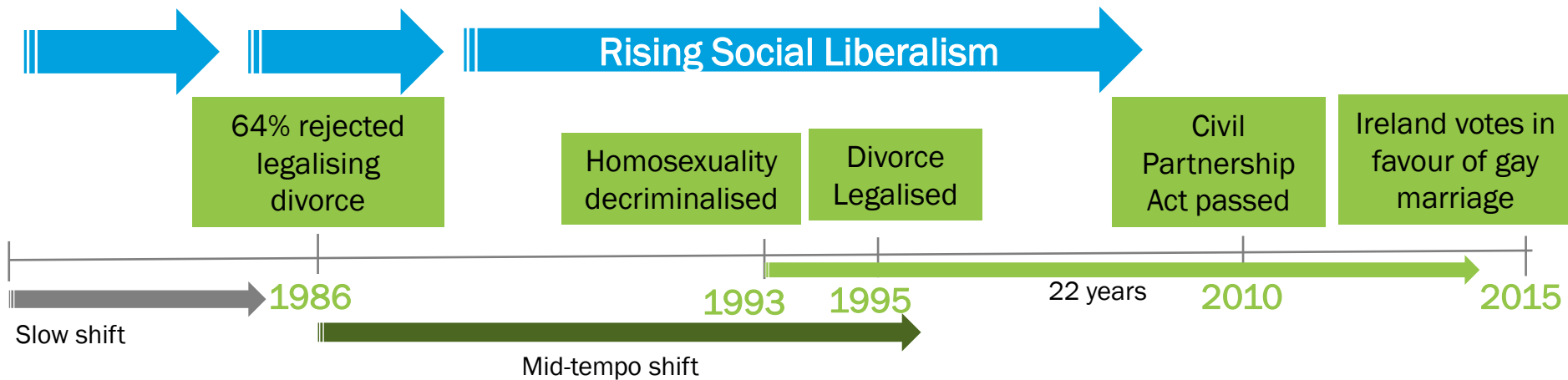
Ireland says big 'Yes' to gay marriage in world first

Aljazeera- Qatar

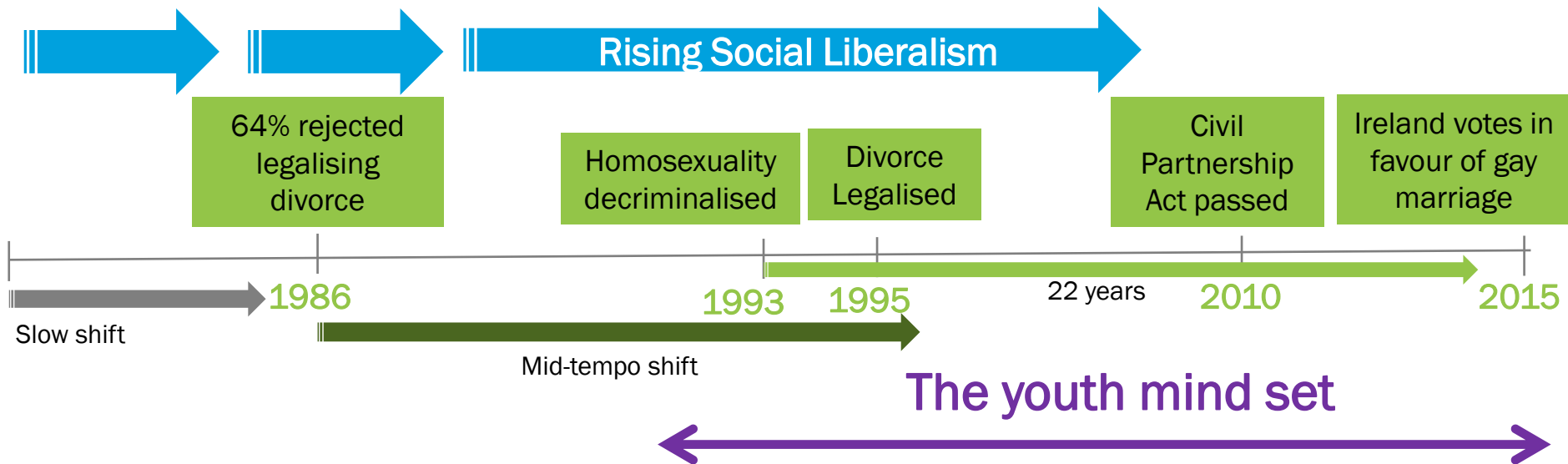
Ireland has seen huge change over the last decade




There have been significant long term changes in social attitudes



There have been significant long term changes in social attitudes





A wave of social liberalism is re-defining Ireland

“

The rigid morals and rules of that time have given way to a surprising liberalism. But it is a strange death, in which many of those who still describe themselves as Catholic have joined Ireland's astonishing social revolution.

”

[GARY LYNCH](#),

PROSPECT MAGAZINE, 2015

The youth in Ireland are leading the way with an outward-looking mentality

'I am always looking
for different cultural
experiences and
influences that will
broaden my
horizons'
% agree
strongly/slightly

45%

57% of 16-24 year olds

39% of 25-34 year olds

39% of 35-49 year olds

42% of 50+ year olds

An abstract background featuring a dark grid with vibrant, multi-colored lines (pink, blue, and purple) that appear to be data or light trails.

Globally, technological advances have been unparalleled

“

We are about to enter a world that is half digital and half physical, and without properly noticing, we've become half bits and half atoms. These bits are now an integral part of our identity.

”

[HANNES GRASSEGER](#)

ECONOMIST AND AUTHOR OF *I AM CAPITAL*

2005



2013



Four smartwatches are arranged on a dark, textured wooden surface. From left to right: a black smartwatch with a black strap, a black smartwatch with a black strap, a silver smartwatch with a black strap, and a black smartwatch with a black strap. The text "Technology is no longer just a platform. It's a lifestyle." is overlaid in white.

Technology is no longer just a platform.
It's a lifestyle.

“

Technology isn't a section in the
newspaper anymore. It's the culture.

”

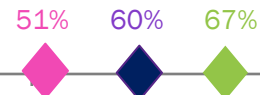
BEN SMITH
EDITOR-IN-CHIEF OF BUZZFEED

But the tensions of technological realities are being felt by consumers in Ireland

The internet has made it easier for me to be creative



The internet helps me connect with other like-minded individuals and make friends



16-24 TOTAL:		GLOBAL TOTAL:		IRISH TOTAL:	
-----------------	--	------------------	--	-----------------	--

But the tensions of technological realities are being felt by consumers in Ireland

I am concerned about data protection and privacy on the internet

69% 75% 76%

It is important for me to sometimes disconnect from online and mobile communications

57% 61% 66%

16-24
TOTAL:



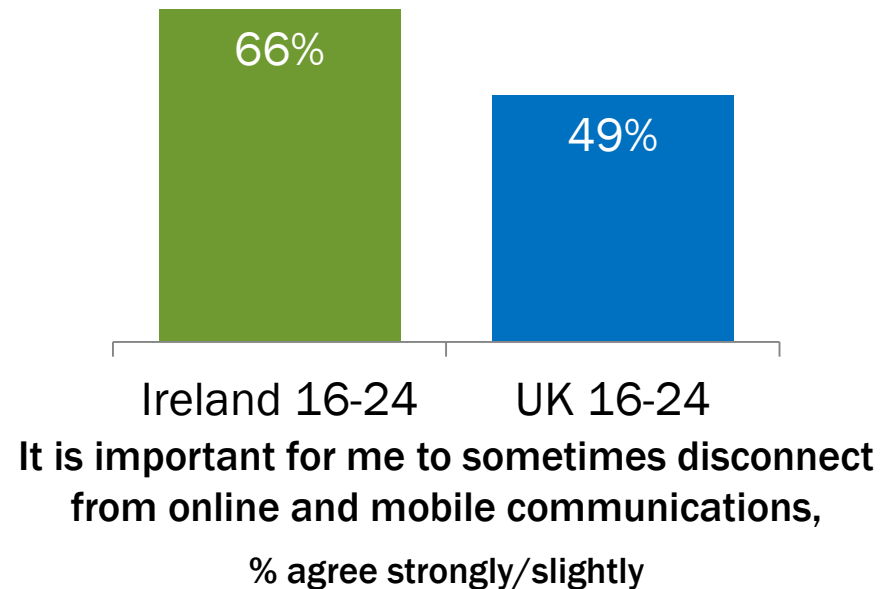
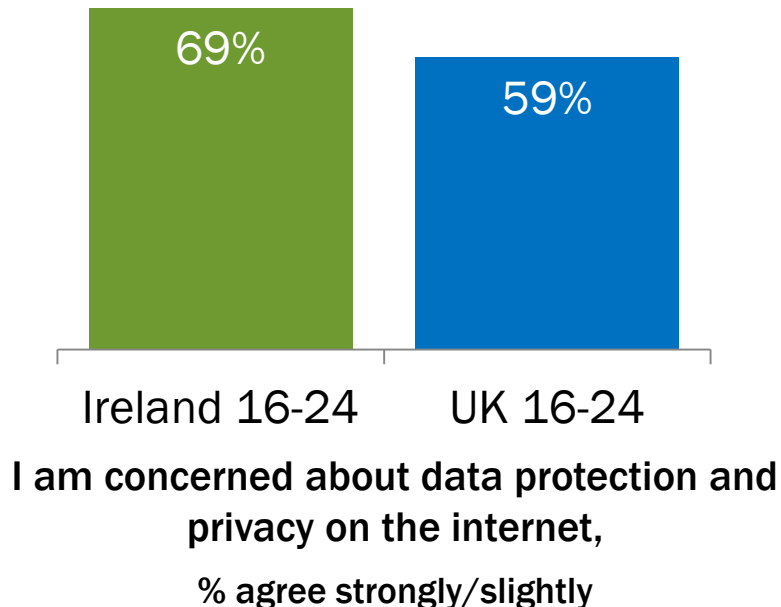
GLOBAL
TOTAL:



IRISH
TOTAL:



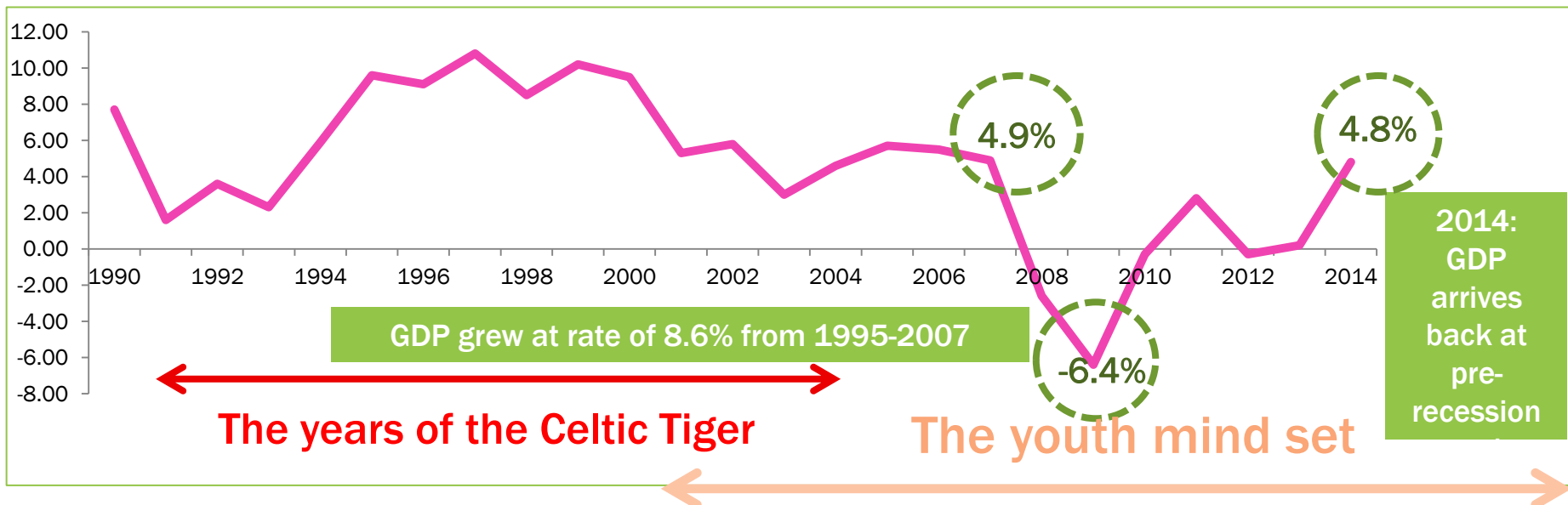
Compared to neighbouring younger UK consumers, the youth in Ireland are demonstrating greater levels of technological wariness



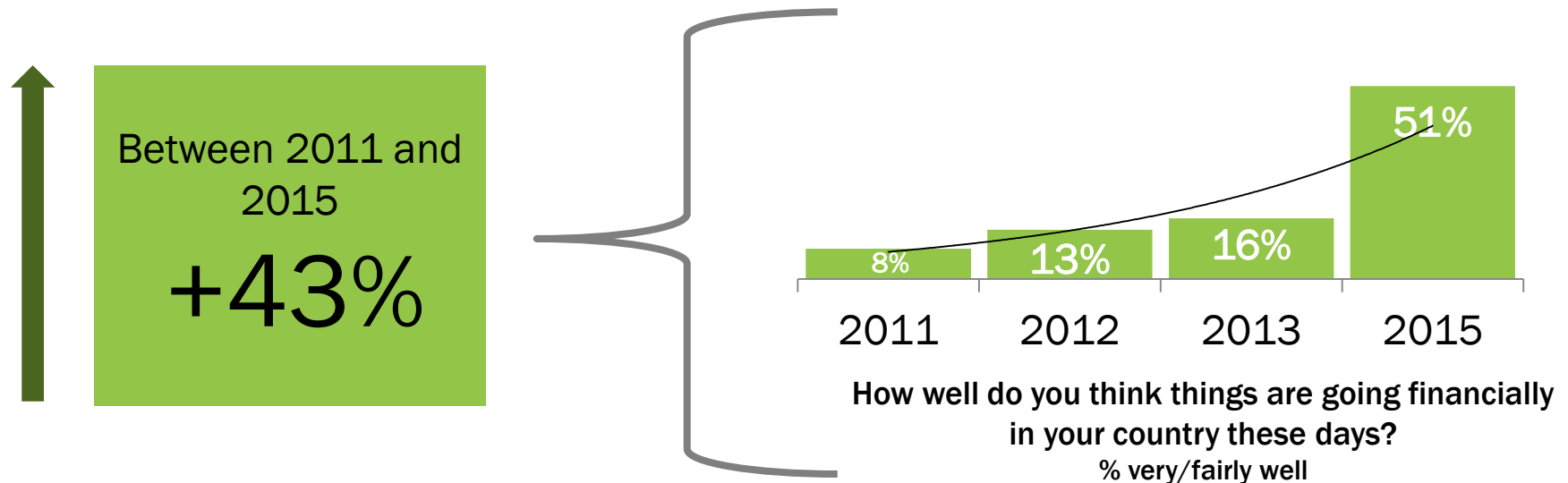
Ireland has been on a turbulent economic ride



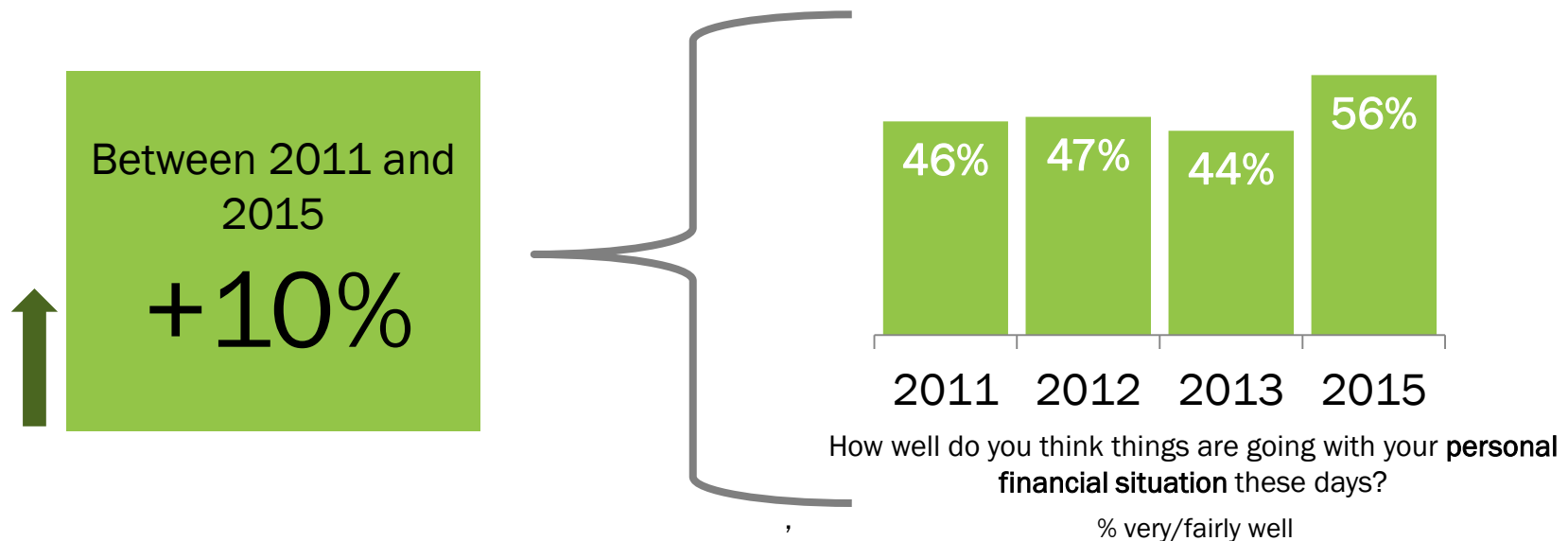
Rates of growth, 1990-2014, Ireland:



Today, consumer perceptions of the Irish economy improving



Which is impacting their attitudes towards their personal finances



On a global scale, people are feeling less positive...



Global

Between 2011 and
2015

-3%



40%

38%

37%

2011

2013

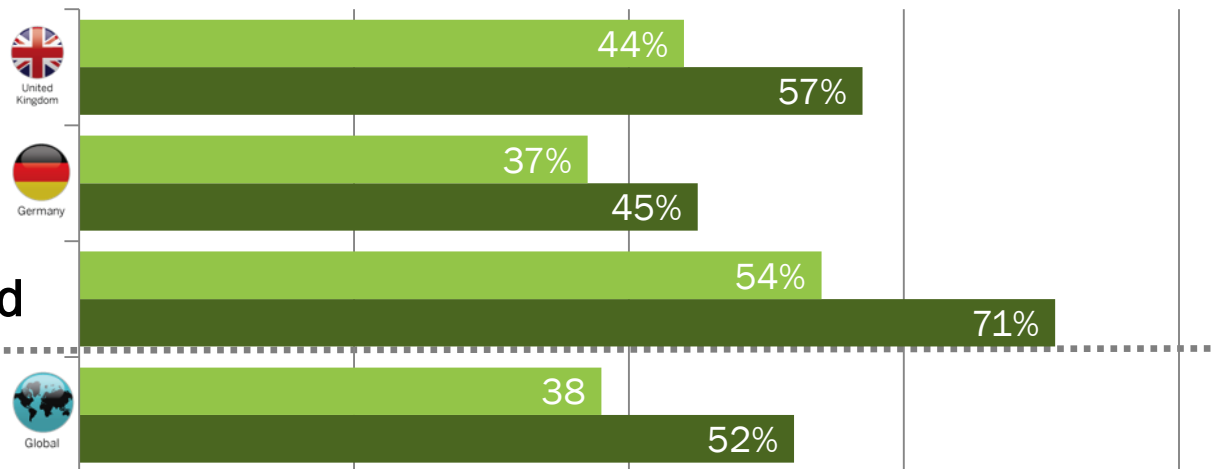
2015

How well do you think things are going with your **personal financial situation** these days?

With greater positivity comes growing confidence

2010
2015

Ireland



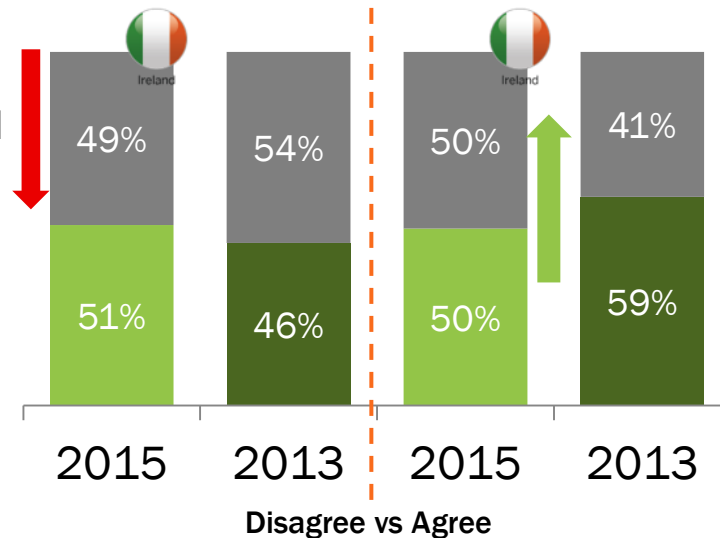
'I consider myself knowledgeable about money matters'

% agree strongly/slightly, 2015



And by taking lessons from the past, Irish consumers are starting to live for the moment

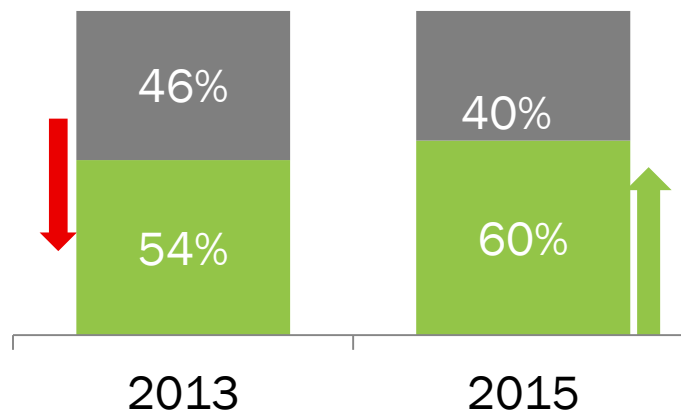
“It is important to prepare for the future and stay focused on longer-term goals and outcomes”



“It is important to live in the moment, and make the most of what today has to offer”

With younger consumers in Ireland also embracing this attitude

“It is important to prepare for the future and stay focused on longer-term goals and outcomes”



Top 3 VS bottom 3, 2013-2015

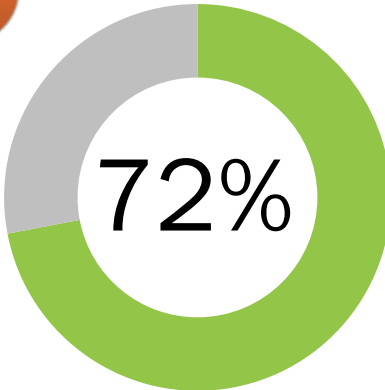
“It is important to live in the moment, and make the most of what today was to offer”



Buoyed by the sense of having weathered the storm, consumers feel increasingly empowered



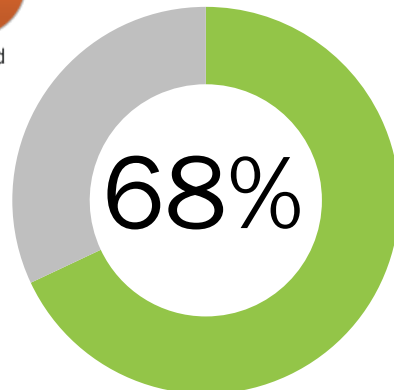
Ireland



'Our lives and destinies are largely shaped by the decision we have made and action we have taken',
% agree, 2015



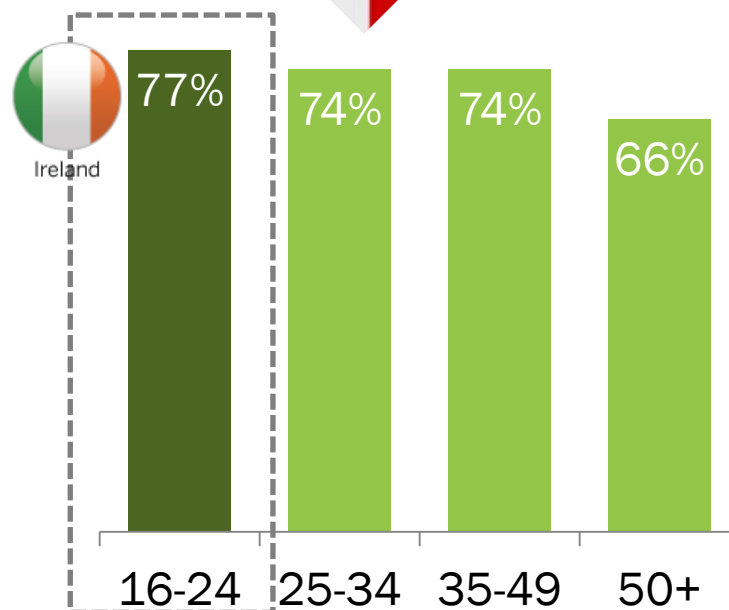
Ireland



'I feel that I can make a difference to the world around me through the choices I make and the actions I take',
% agree, 2015

The Power

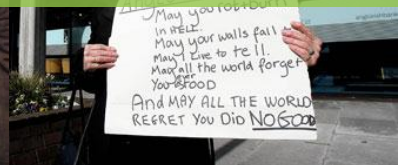
Above any other age group, 16-24 year olds are showing the strongest sense of agency of

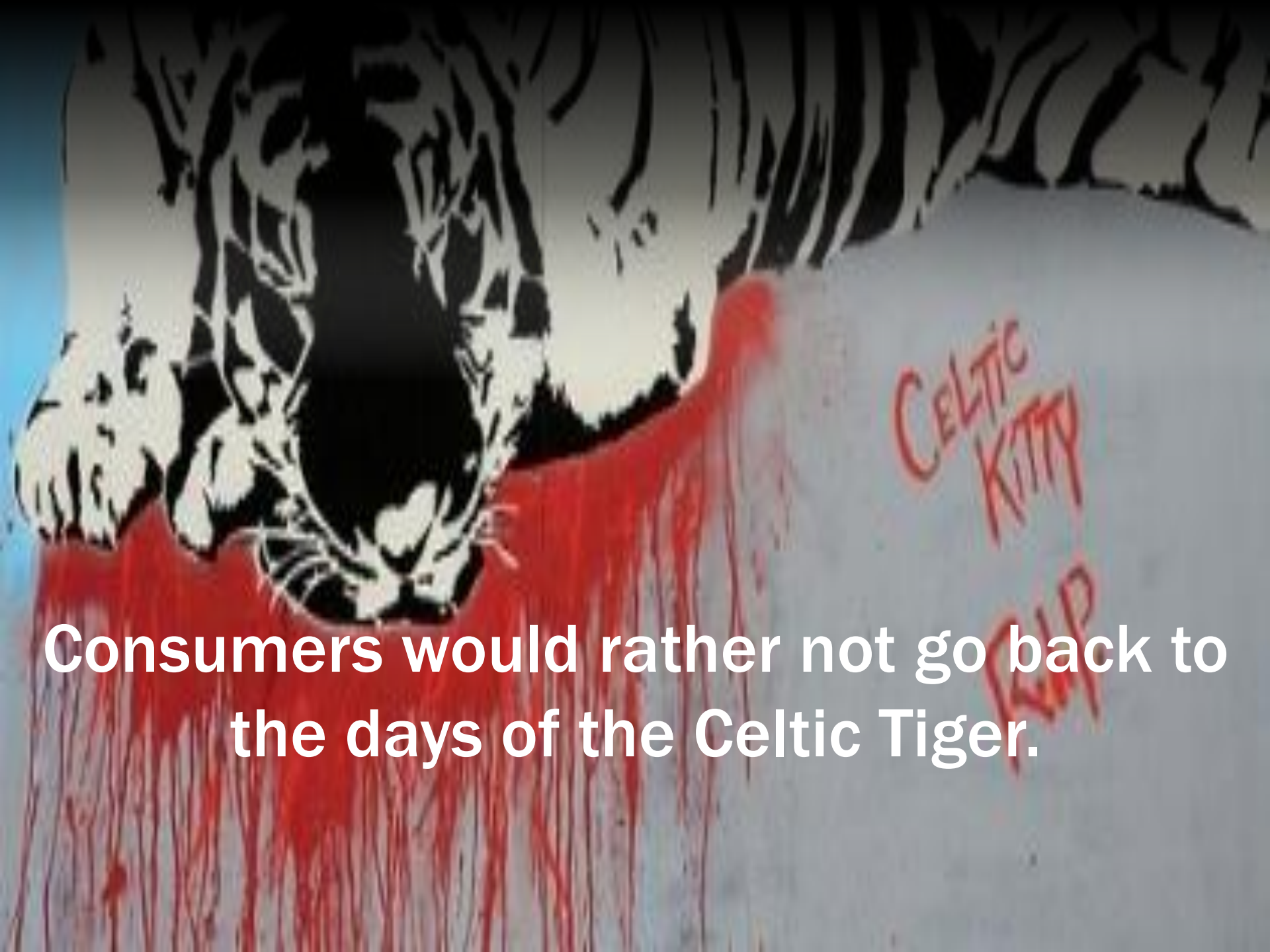


'Our lives and destinies are largely shaped by the decision we have made and action we have taken', % agree, 2015




Is the Celtic Tiger back?





**Consumers would rather not go back to
the days of the Celtic Tiger.**

A seismic value shift, technology and a turbulent economic ride has brought consumers to a crossroads:



There is little desire to go back to the days of the flashy Celtic Tiger



..Or the 'good old days' of traditional conservative Ireland

‘Where are we now?’

The new consumer agenda



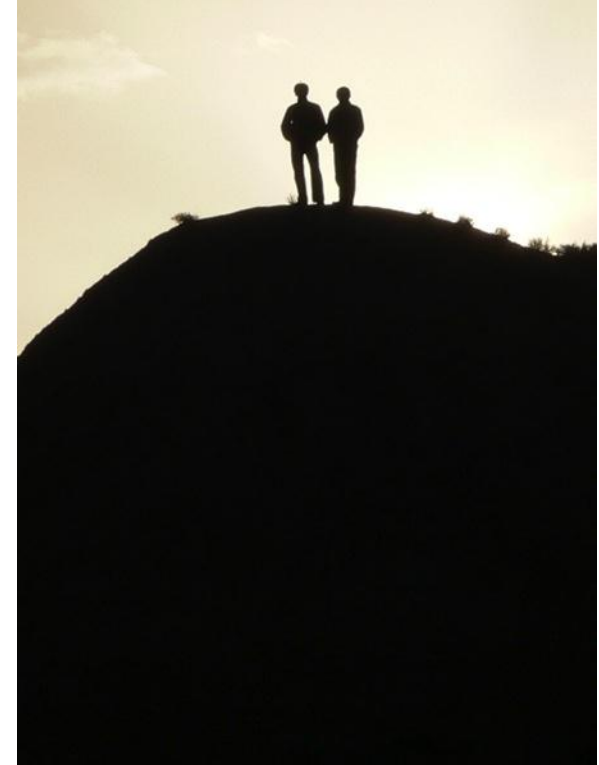
1.

Self-reliance



2.

Balance



3.

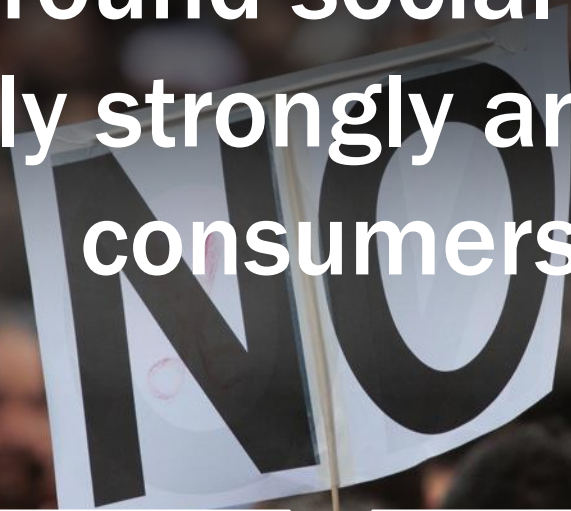
**Post-
materiality**

1. Self-reliance



Crippling levels of trust towards businesses is creating both a *need* and *desire* for self-reliance

Frustration around social injustice is felt particularly strongly amongst Irish consumers



‘Too much money is concentrated in the hands of too few people’

81% 90%



‘There is one set of rules for the richest people, and another set for everyone else’

81% 90%



% agree strongly/slightly, 2015

Global:  Ireland: 

Younger consumers are also expressing their frustration



'Too much money is concentrated in the hands of too few people'

81% 85% 90%

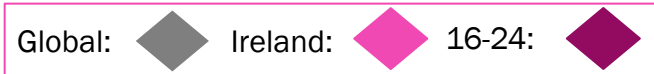


'There is one set of rules for the richest people, and another set for everyone else'

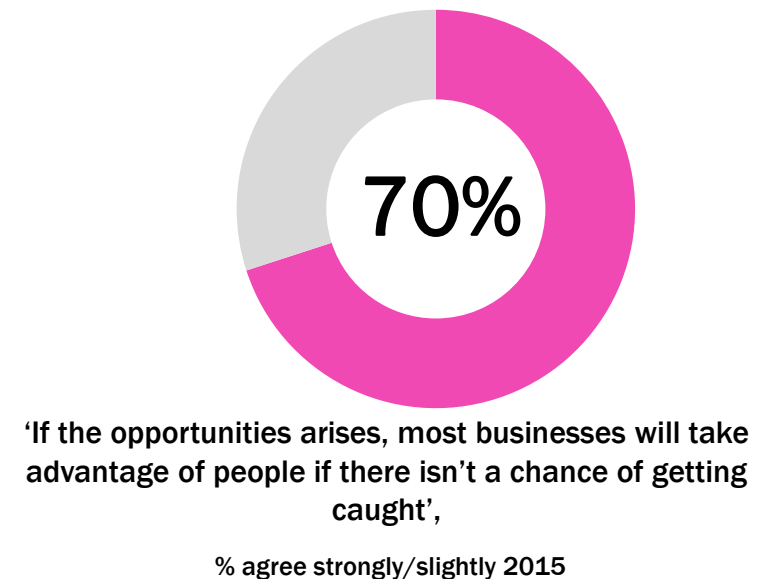
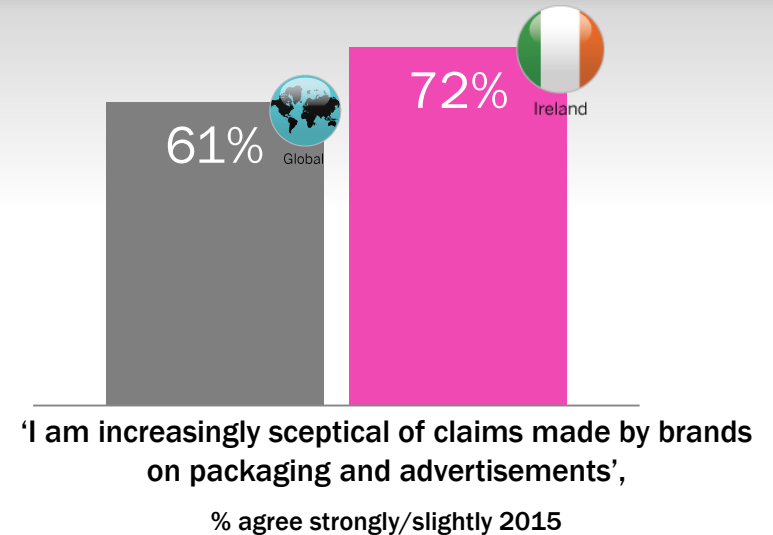
81% 85% 90%



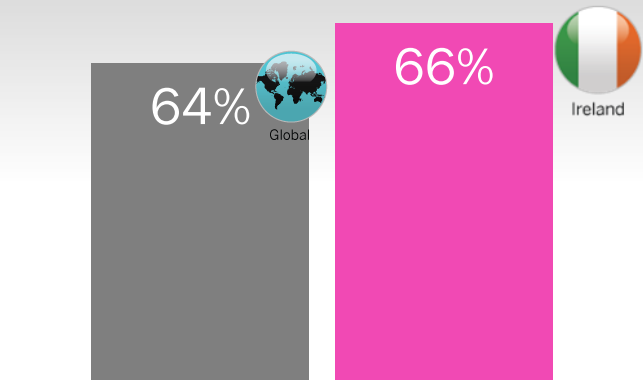
% agree strongly/slightly, 2015



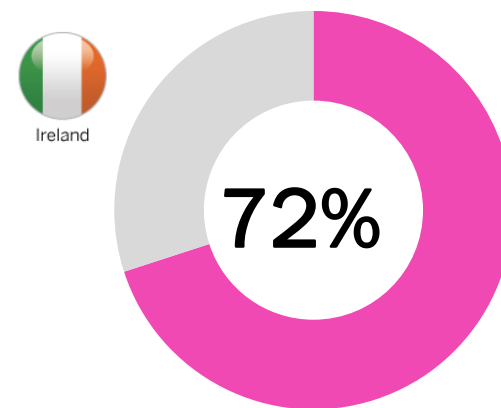
Levels of trust in institutions and businesses are hitting rock bottom



The youth in Ireland are sharing this scepticism

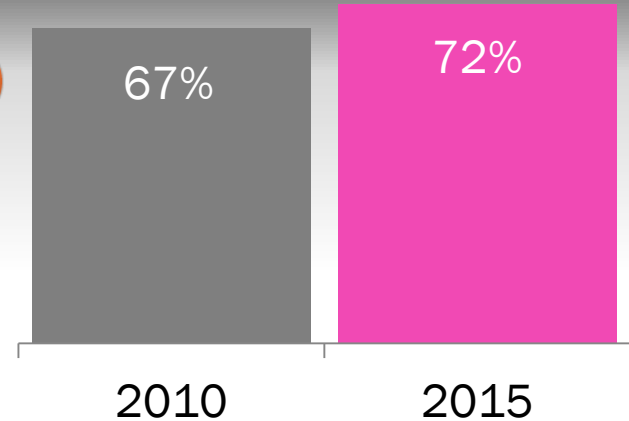


'I am increasingly sceptical of claims made by brands on packaging and advertisements',
% agree strongly/slightly 2015



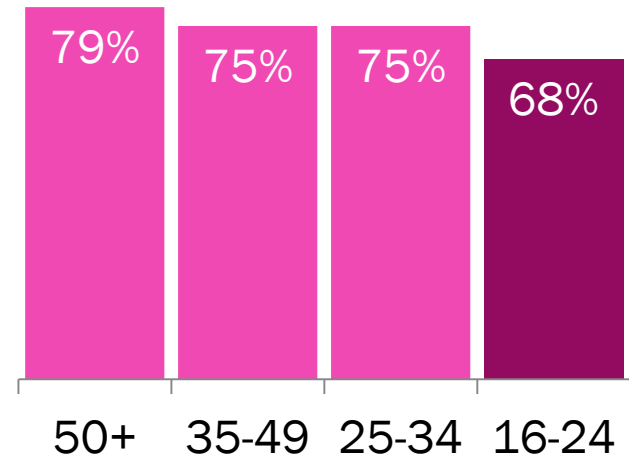
'If the opportunities arises, most businesses will take advantage of people if there isn't a chance of getting caught',
% agree strongly/slightly 2015

1. Consumers are taking extra care when making purchases



'I'm increasingly likely to spend time researching a product before making a purchase',

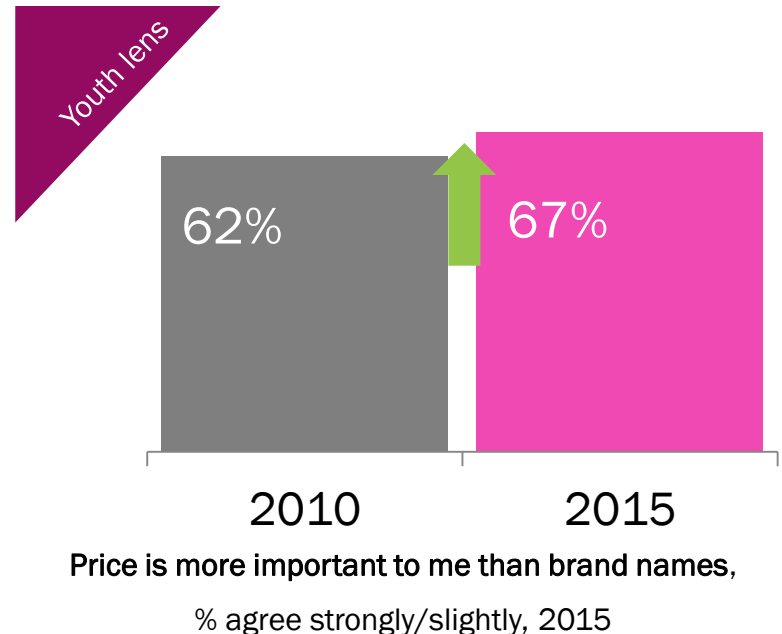
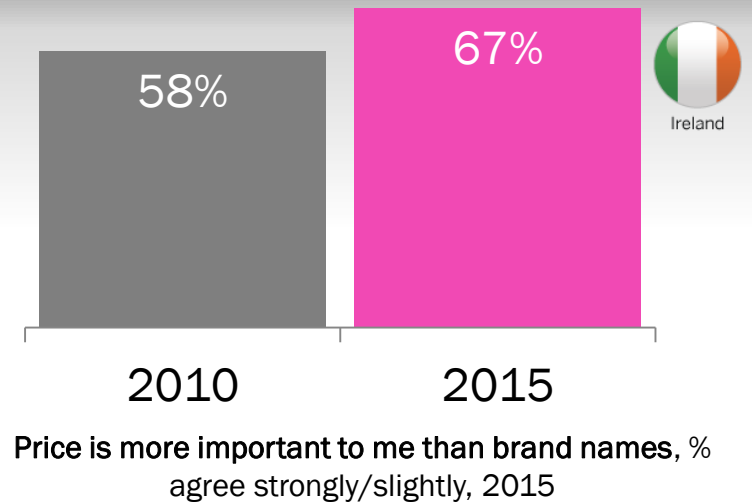
% agree strongly/ slightly, 2015



'I'm increasingly likely to spend time researching a product before making a purchase',

% agree strongly/ slightly, 2015

**2. They're also
become more price
conscious and less
interested in brand
names**



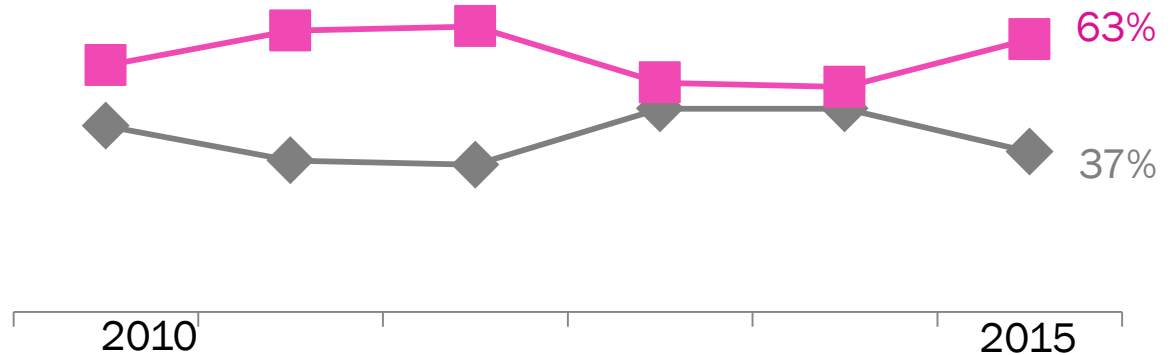
Ultimately, consumers are learning that relying on yourself is the safest route



Becoming as self-reliant as possible

OR

Seeking the help and guidance of experts or professionals



'Please choose which statement you believe will give you a better chance of succeeding in life'

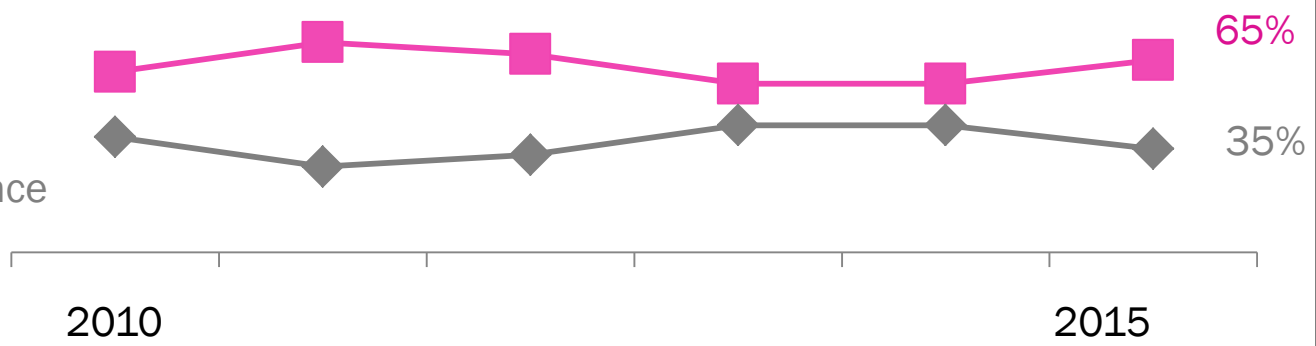
The youth have arrived at the same point but with greater fluctuation over the last 5 years



Becoming as self-reliant as possible

OR

Seeking the help and guidance of experts or professionals



'Please choose which statement you belief will give you a better chance of succeeding life'

Consumers are now looking for a human face behind everything



Supporting independent publications: Dublin Zine Fair



And expectations of total transparency and responsibility are rising

**Celebrating simplicity through
transparency: VOYA**



**It's important to remember that trust
hasn't relinquished, it's being
redistributed**



**The possibilities of a sharing
economy: Airbnb**

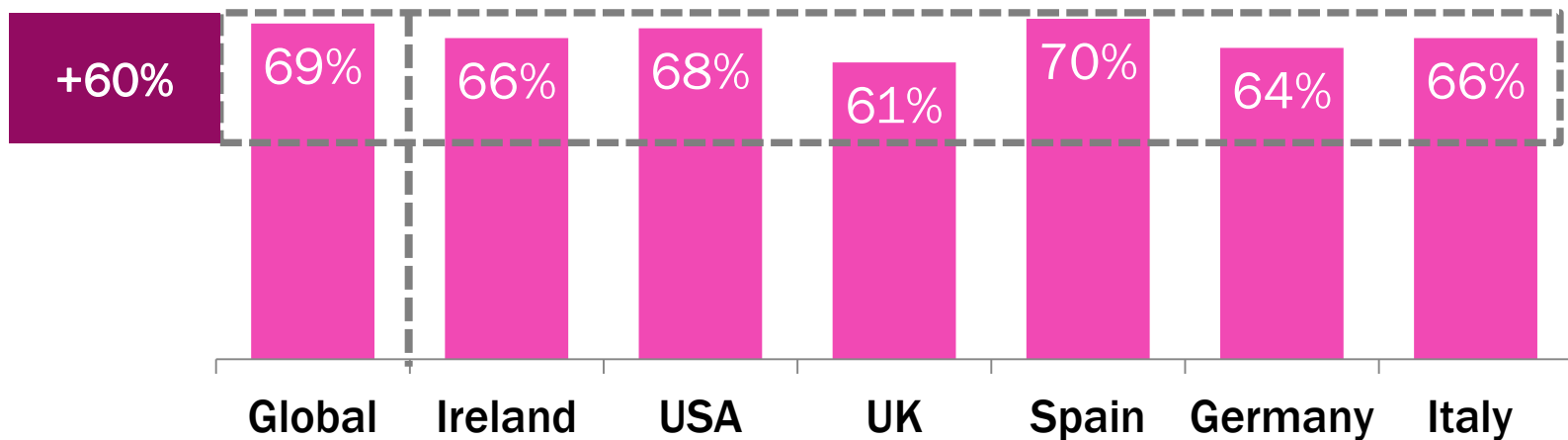


2. Balance



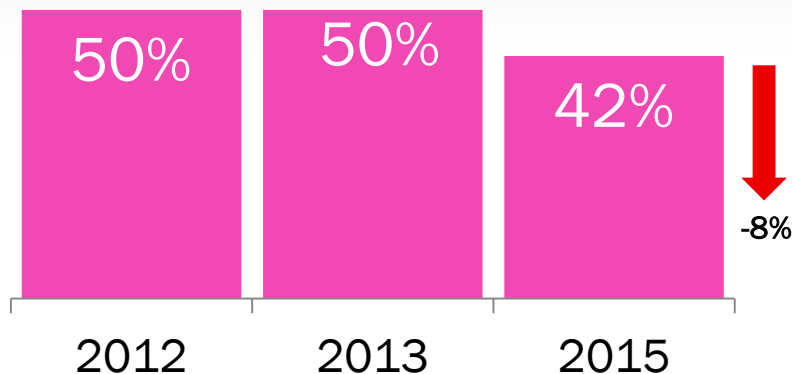
**Growing desire for
balance and driven by a
desire to manage life,
and not let life manage
you**

It's simple.
People are leading busier and more
complex lives.



'More and more, I am looking for ways to simplify my life',
% agree strongly/slightly, 2015


**Consumers in Ireland
are starting to
recognise that they
have the tools to find
time for everyday
reflection**



'It is hard to find space in my life to think, reflect and switch off from everyday pressures and stresses',

2012-2015, % agree strongly/slightly





Consumers seek
balance as a way of
translating and
muting modern
lifestyle – not
changing it

“

As our lives rush past at top speed, it is no wonder we are becoming hooked on something that promises to slow us down, force us to consider the moment, to connect with our feelings, but maintain distance from them. Balance promises to do these things.

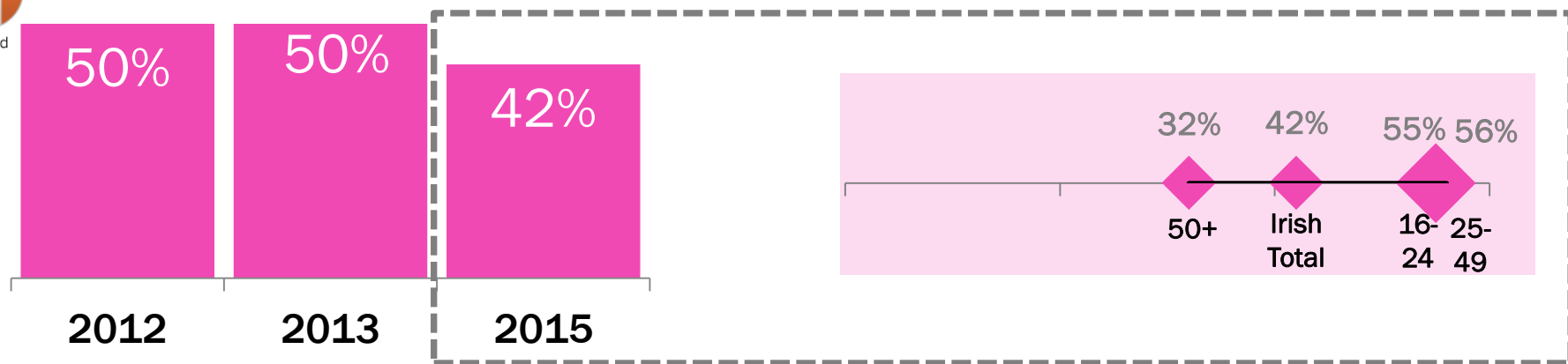
”

EMILY HOURICAN
THE IRISH INDEPENDENT

Surprisingly, the younger age groups are finding it the most difficult to switch off and reflect from everyday pressures



Ireland



'It is hard to find space in my life to think, reflect and switch off from everyday pressures and stresses',

2012-2015, % agree strongly/slightly

An increased awareness for balance is leading consumers to re-assess their online presence



Ireland

61%

Up from 58% in
2013

Youth lens

66%

'It is important for me to sometimes disconnect from online and
mobile communications',

% agree slightly/strongly, 2015

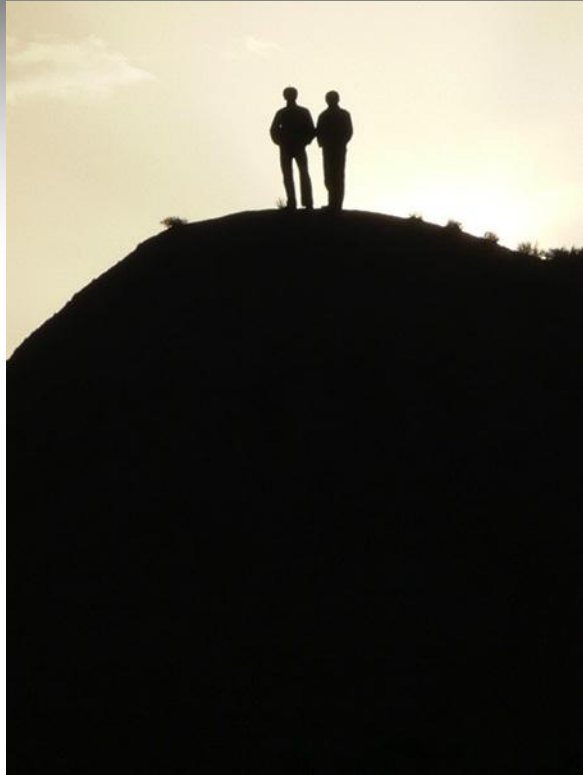
Consumers appreciate services that help them get closer to balance



They're also placing greater value on those 'pause, stop, reflect' moments



3. Post-materiality



Consumers are re-assessing the value of material possessions and have begun to return to the important foundations in life



“

Post-materialism is not asceticism; post-materialists simply de-emphasise material pleasures in comparison to higher order needs such as freedom, self-expression, and the quality of life

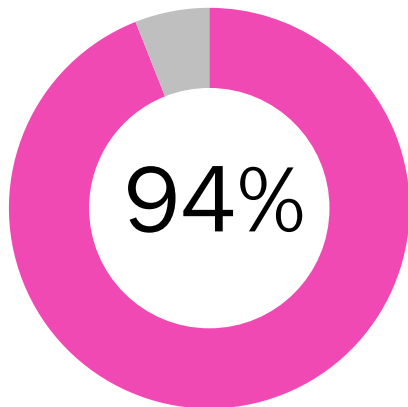
”

[NANCY WONG](#)

MATERIALISM: ORIGINS AND
IMPLICATIONS FOR PERSONAL WELL-
BEING

As the post-material mind set sets in, markers of success are returning back to simpler times

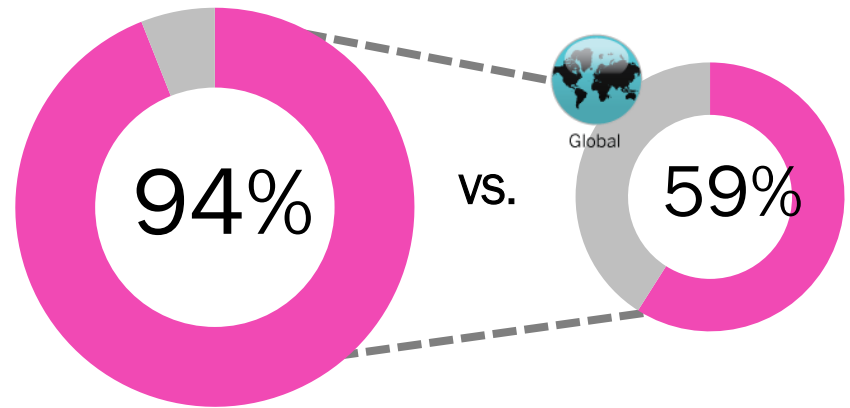
Good health:



'Being physically fit and in good health' as
a sign of success,
2015



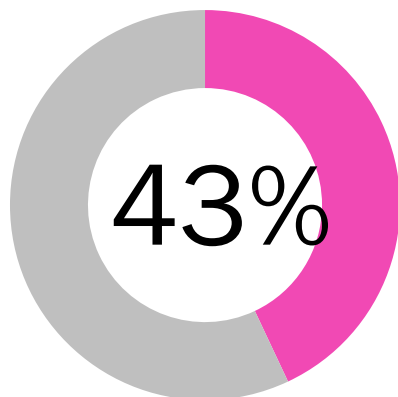
Debt-free:



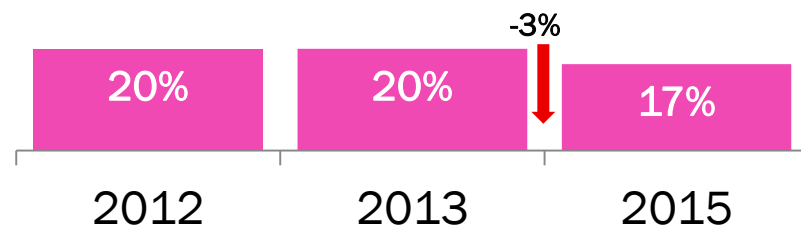
'Being debt free' as a sign of success,
2015

Other previous signs of achievement are losing their appeal

Material possessions:



'Owning luxury products and brands' as a sign of success, % strongly/slightly, 2012-2015



'I would be happier if I owned more material possessions', % agree strongly/slightly, 2012-2015

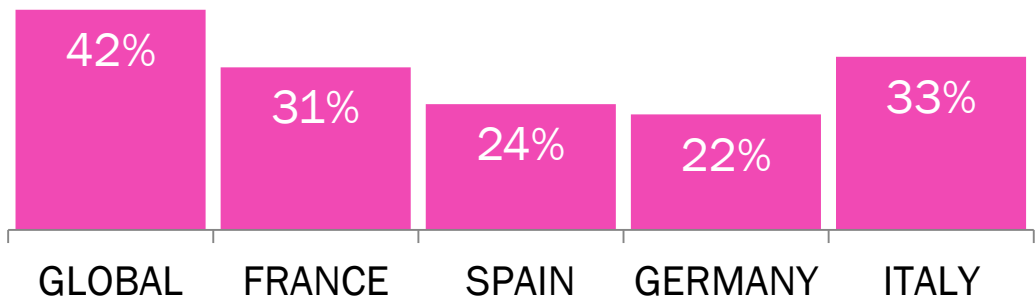


Owning material possessions remains important for other European markets



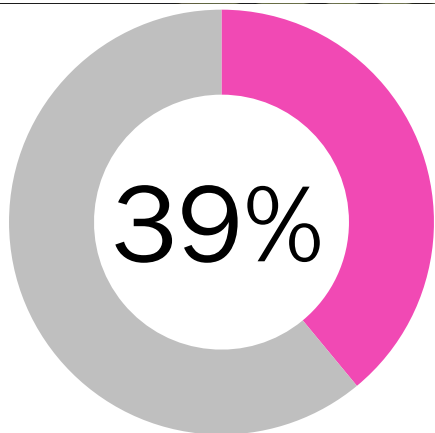
Ireland

vs.
17%
In Ireland
2015

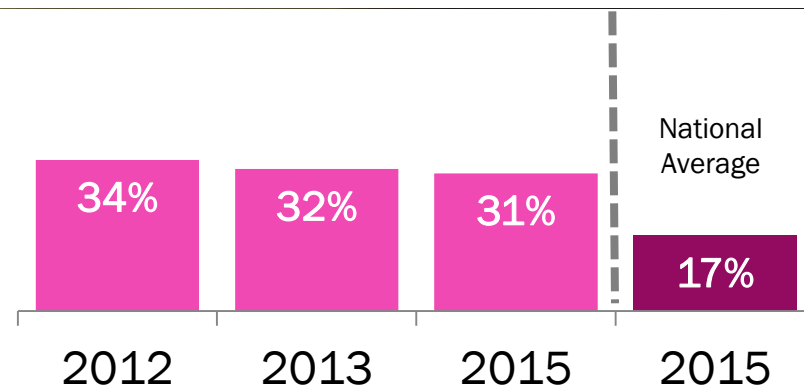


'I would be happier if I owned more material possessions',
% agree strongly/slightly, 2015

Youth in Ireland share the same story; despite valuing owning more material possessions more highly



'Owning luxury products and brands' as a sign of success
% 2015



'I would be happier if I owned more material possessions'
% agree strongly/slightly, 2012-2015

As a result, consumers want inclusion and are less and less enticed by exclusivity



Desire for exclusivity...



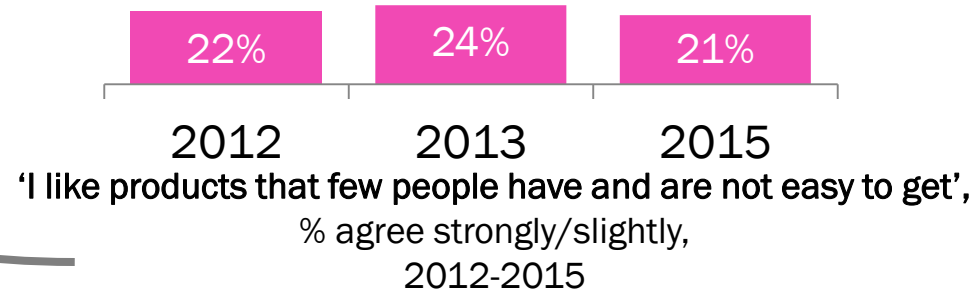
Global

vs.

32%
Globally
2015



Ireland



In comparison to other markets, Ireland feels particularly strongly about exclusivity

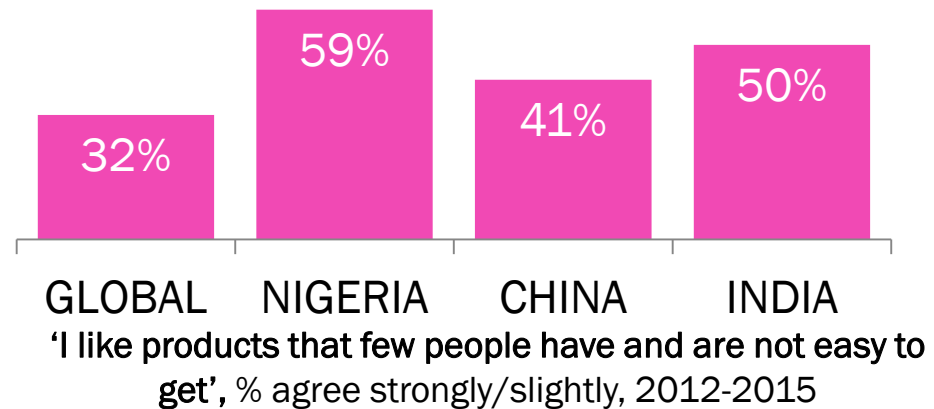


Fading desire for exclusivity...



Ireland

vs.
21%
In Ireland
2015



Consumers are looking for unique experiences that are open to *everyone*



Pop-up restaurants that bring people together:



They are also becoming increasingly aware of the implications of consumerism



So, in summary consumers are:



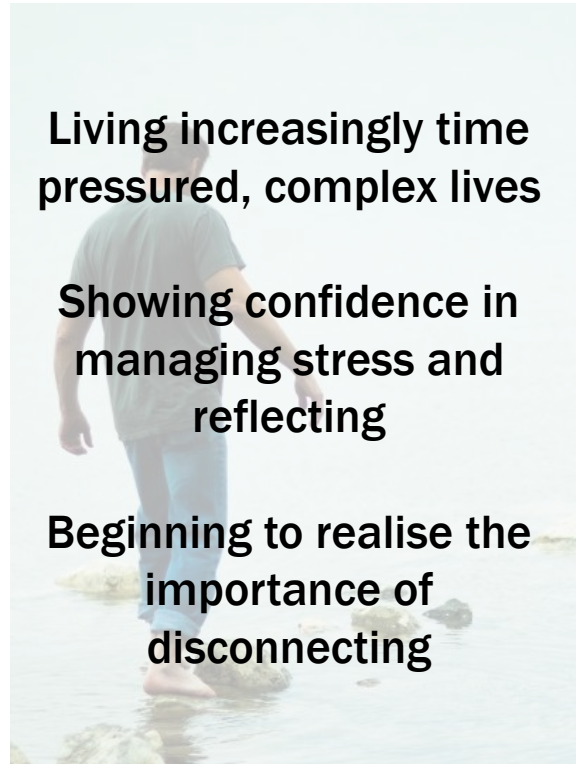
**Declining levels of trust
towards institutions,
corporations and brands**

**More considered
purchase choices**

**Recognising the benefits
of becoming self-reliant**

1.

Self-reliant



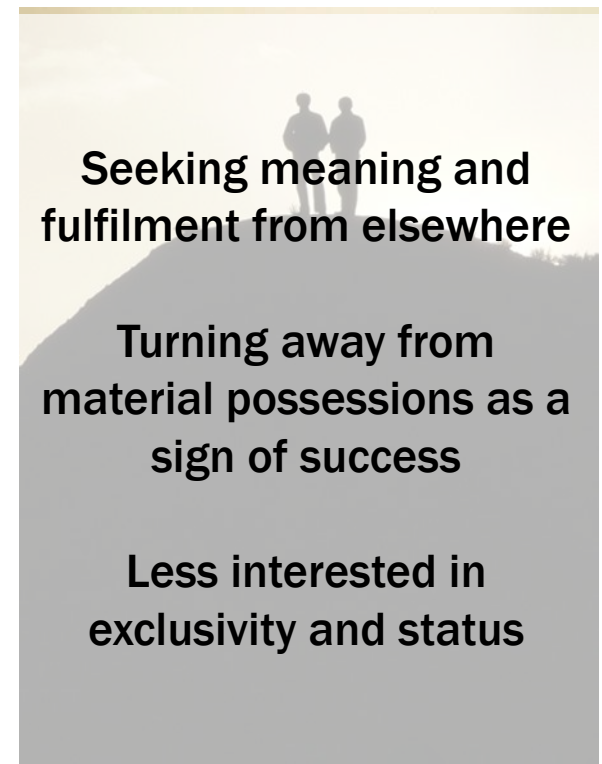
**Living increasingly time
pressured, complex lives**

**Showing confidence in
managing stress and
reflecting**

**Beginning to realise the
importance of
disconnecting**

2.

Balanced




**Seeking meaning and
fulfilment from elsewhere**

**Turning away from
material possessions as a
sign of success**

**Less interested in
exclusivity and status**

3.

**Post-
materiality**



**Not everything has changed.
One value in particular is just as strong in
Ireland today as it was yesterday**

The background of the slide features a stylized illustration of two hands, one in red and one in yellow, holding each other in a supportive grip. The hands are rendered with soft shadows, giving them a three-dimensional appearance. The background is a mix of light blue, green, and orange tones.

COLLECTIVE KINSHIP

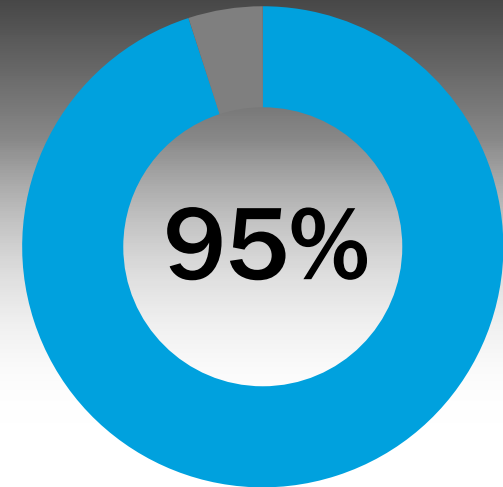
**Engaging in the spirit of togetherness and
knowing that no journey should be alone**



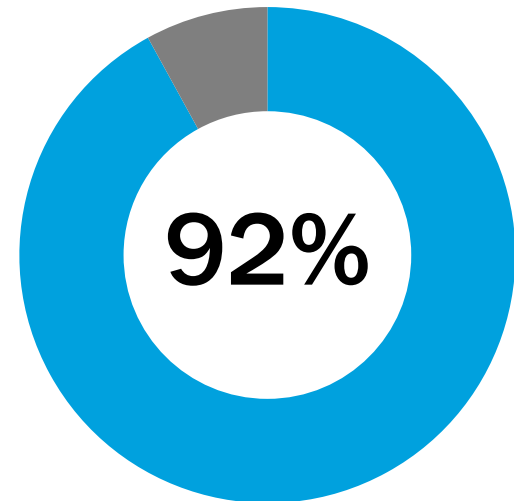
MEITHEAL

Rural tradition in Ireland where people gathered together on local farms to save hay or harvest crops – build relationships

Valuing those around you is obligatory and rewarding for Irish consumers

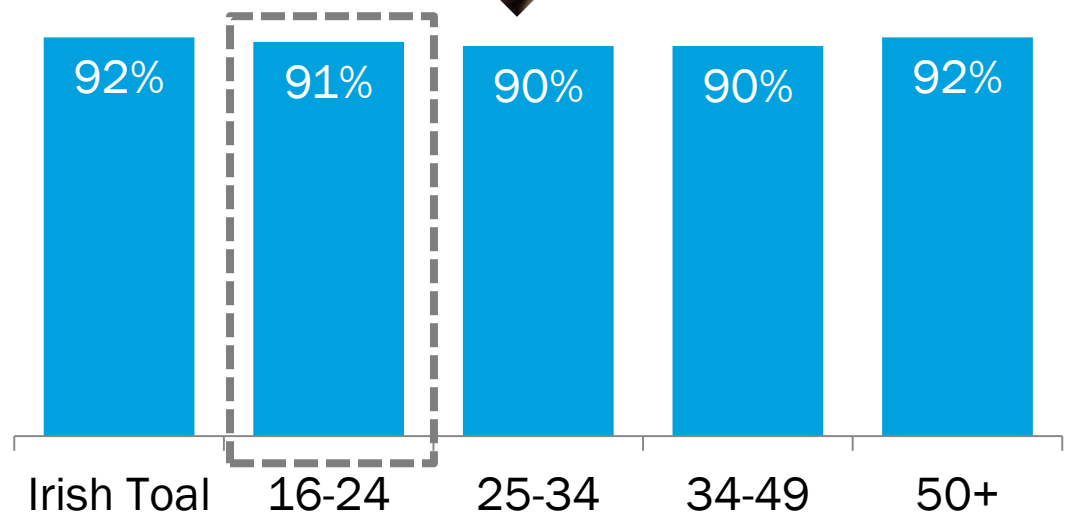


"I believe I know someone I could rely on in time of need"
% agree strongly/slightly, 2015



"I view being a dutiful member of your family as a sign of success"
% agree strongly/slightly, 2015

And this tie is seen to be no less strong
amongst younger consumers



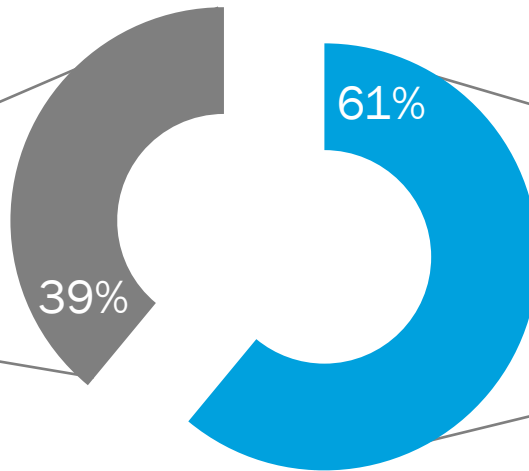
'I view being a dutiful member of your family as a sign of success',

% agree strongly/slightly, 2015

Consumers continue to place greater importance on their 'inner circle' as the priority

THE GLOBAL CITIZEN

We should prioritise the interests of the world at large over the interests of our country



OUR NATION, OUR PRIORITY

We should prioritise the interests of our country over the interests of the wider world

% split, vs, 2015

Global citizenship is even less of a priority for younger consumers

THE GLOBAL CITIZEN

We should prioritise the interests of the world at large over the interests of our country

32%

68%

OUR NATION, OUR PRIORITY

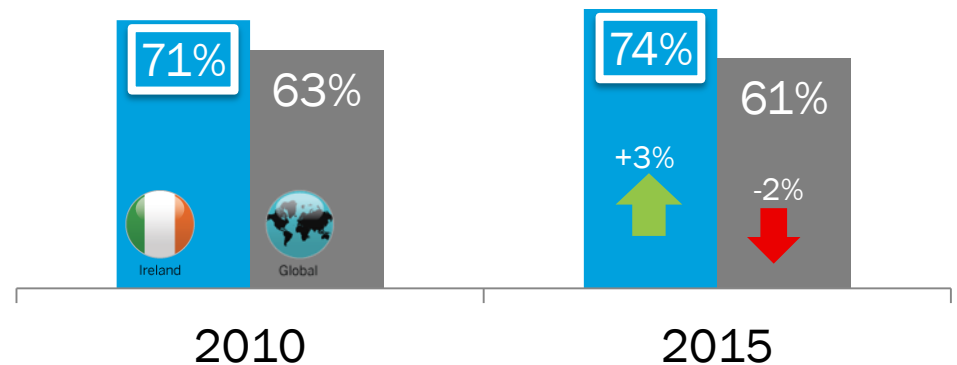
We should prioritise the interests of our country over the interests of the wider world

% split, vs, 2015



As a result, Irish consumers believe that small changes can make a big difference

Ireland
+13%
On global average
2015



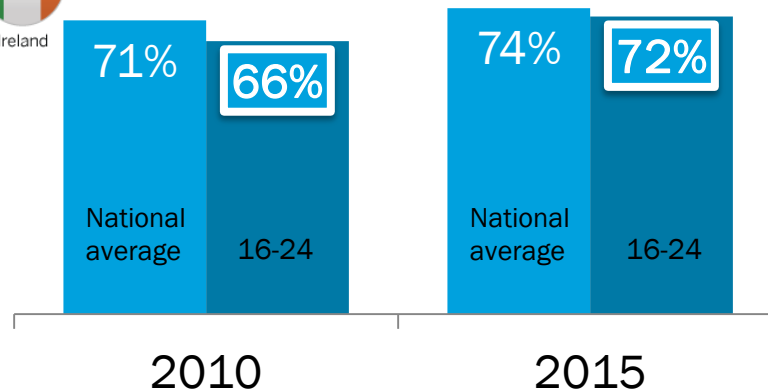
‘Groups of individuals making a small change in their behaviour can make a real difference in the world’, % agree, 2010-2015

Younger consumers agree.

16-24
+8% rise 2010-2015



Ireland



'Groups of individuals making a small change in their behaviour can make a real difference in the world', % agreeing, 2010-2015

Consumers are embracing opportunities to collaborate with others

Growing communities

The NEC Farmers Hill Community Garden is the product of North East Inner City community. Nearly the entire community have assisted both physically on the site and through their support. Many are now using the garden as a place to grow their food and flowers as the garden is intended for all of the community. The garden was successfully highlighted on RTE on the 'Dirty Old Towns' programme and continues to highlight the importance of growing produce in urban spaces.



A group of young people are sitting around a wooden table in a meeting room. In the background, there are posters, including one that says 'include YOUTH' and another titled 'WHERE FUTURES ARE BUILT'. The text 'Which is making them value the importance of encouraging and empowering those around them' is overlaid in white on the image.

Which is making them value the importance of encouraging and empowering those around them

Communities that encourage young people:

Include youth organisation runs a scheme called 'Give and Take' which adopts a youth work approach to improving the employability and confidence of young people to help them achieve their potential.

include
YOUTH

...And using creative outlets to convey strong, unified messages

Unity through creativity

Sending messages through graffiti in urban settings has been a creative outlet for some time, but Joe Caslin's mural in the centre of Dublin has become instantly iconic and was painted in support of the YES vote.



‘Where are we now?’

**First we asked...
What’s changed?**



THE NEW CONSUMER AGENDA

**Self-reliance
Empowerment
Post-materiality**

**And then explored...
What’s stayed the same?**



THE CORE VALUE

Collective Kinship

‘Where are we now?’

First we asked...
What’s changed?



THE NEW CONSUMER AGENDA

Self-reliance
Empowerment
Post-materiality


And then explored...
What’s stayed the same?



THE CORE VALUE

Collective Kinship

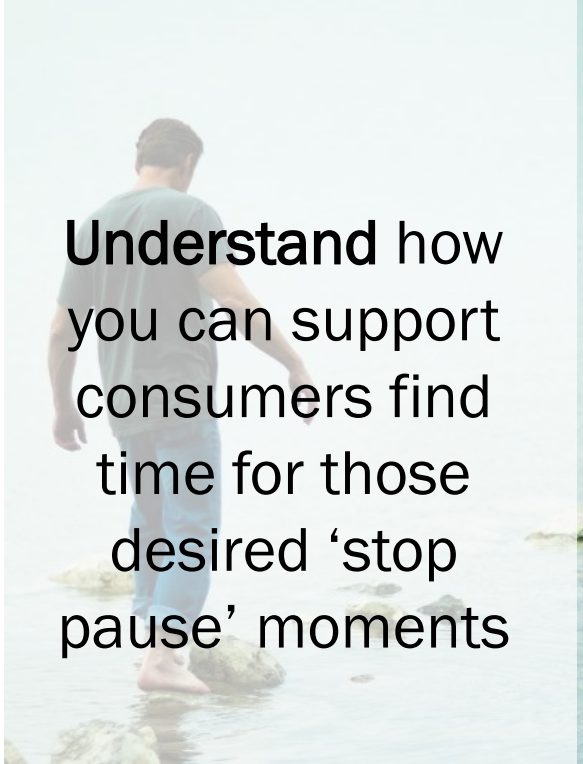
Calls to action:

A woman wearing a black headscarf with a white patterned face veil is looking out of a window. The background shows a colorful abstract painting. The text is overlaid on the lower part of the image.

**Help consumers to
become more
resilient and
resourceful**

1.


Self-reliance

A person is standing in shallow water, possibly a beach or a riverbank. They are wearing a blue t-shirt and blue jeans. The water is calm, and there are some rocks visible. The text is overlaid on the right side of the image.

**Understand how
you can support
consumers find
time for those
desired 'stop
pause' moments**

2.

Balance

Two people are standing on a hill, looking out over a landscape. The sky is clear and blue. The text is overlaid on the right side of the image.

**Adapt to fit
consumers
reassessment of
what's really
valuable**

3.

**Post-
materiality**

Self-Reliance – What does it look like?





Fruta Feia, Portugal -
Activist led, it buys “unfit” produce and sells it directly to consumers .



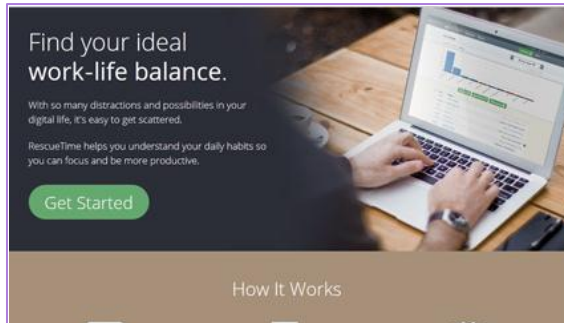
Mercado de trueque's, Mexico: Hand in your inorganic waste and get ‘green points’ in return, which can be used immediately to buy locally grown fresh food.

97-Minute Auctions
No Shipping, Guaranteed Prices.



Services such as Twice (used clothes), **Yerdle** (goods swapping), and **FOBO** (short-term auctions)

Balance – What does it look like?



RescueTime app tracks time spent on sites and programmes on your phone or computer and calculates your productivity during the day.



Landshare.net is a rapidly growing site connecting those who have land/gardens with those who don't.



“Moment's goal isn't to get you to put down your phone forever and live in the woods. ...it is to promote balance in your life.”

Post-Materiality – What does it look like?



Scandic To Go is about premium views, rather than a luxury hotel property.

the **minimalists**



“

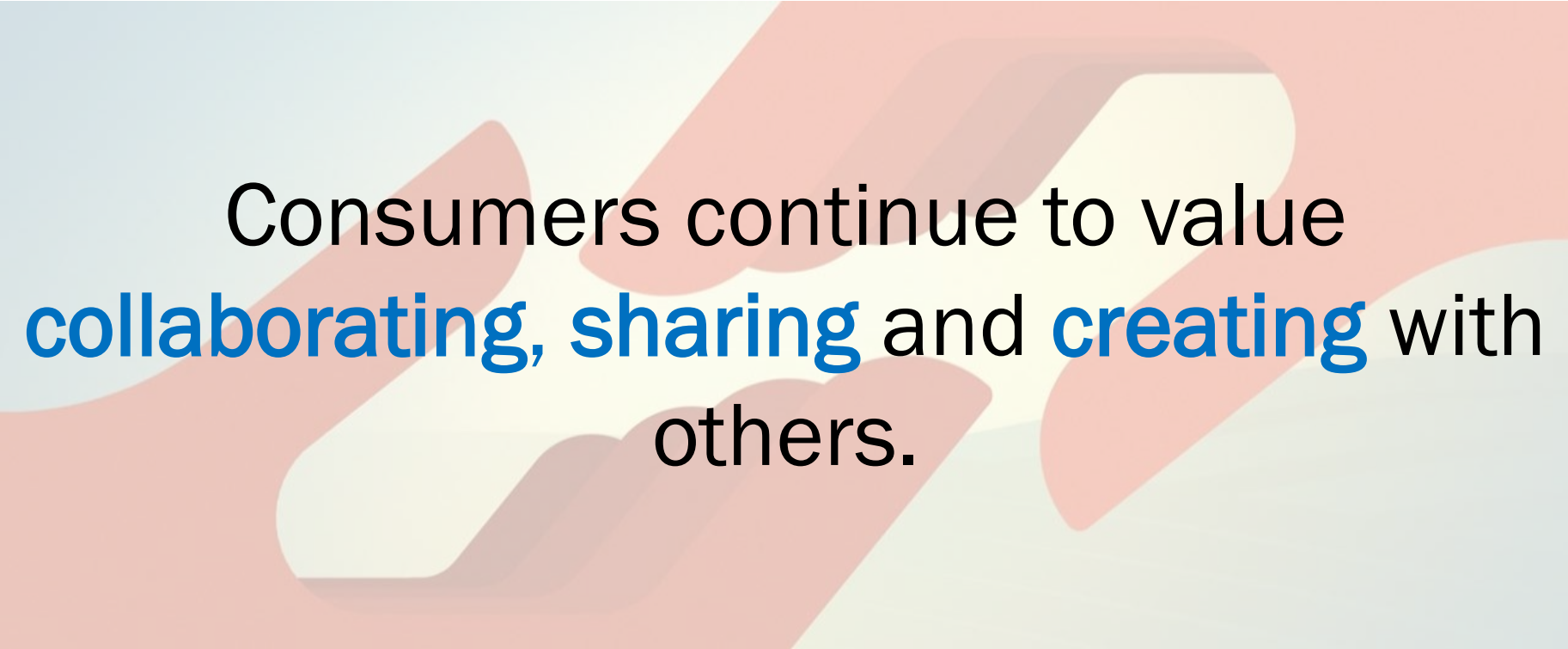
Without the abundant clutter of material possessions you're free to prioritise the stuff that matters

”



'Aftermovies' are a big new thing for festivals

But don't forget:

The background of the slide features a stylized illustration of two hands, one in a light blue color and the other in a light red color, cupping a bright yellow star. The hands are rendered with soft, rounded fingers and palms, creating a sense of gentle support and care. The star is positioned in the center, slightly overlapping the hands. The overall aesthetic is clean and modern, with a focus on positive, collaborative imagery.

Consumers continue to value
collaborating, sharing and **creating** with
others.

Thank you



Growth through consumer understanding

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board